GOING LOCAL for global success: questions for channel providers

Produced by

DIGITAL TV EUROPE

GlobeCast

Introduction

In the current broadcast environment, **experience** is king – making sure that the right content reaches the right viewers on the right devices at the right time is crucial to ensuring maximum penetration – and maximum revenue.

For this reason, as an ever-growing number of international channels fight for shelf space on digital platforms and for the eyeballs of the available global audience, they need to make those channels as relevant as possible to local viewers.

This localization can vary in complexity and scale, from simple time-zone shifting, dubbing and/or subtitling in a local language, to scheduling localized versions of the channel to meet the needs of local audiences, to opt-out windows for advertisers and local programming, all the way to fully-independent localized versions of channels.

These choices will also impact the technical solution chosen to manage the playout and delivery of these channels in multiple territories.

Not least of all, broadcasters must decide on an appropriate distribution strategy that considers all types of platforms as well as linear vs. on-demand content offerings.

This white paper will address the key questions broadcasters need to ask before they launch an international channel distribution strategy and identify some of the choices they must make in implementing that strategy.

Five questions for channel providers

Broadcasters looking to launch channels internationally need to make a decision about how much they wish to invest in a local presence in all or some of the markets in which their channels are distributed.

Third-party media service providers with local expertise can provide insight and guidance for broadcasters seeking to launch in new markets. However, there are five key groups of questions that broadcasters must address.

- What is the target market and what degree of localization is required to meet your channel's commercial objectives?
- What do you need to do to maximize the value of the rights available to you? Do you have the requisite content rights to distribute your channel in a particular form in a particular market?
- What infrastructure do you need to put in place to manage the delivery of content to distributors and end users of the channel? How should your playout be organized? Should it be centralised or distributed? How much should be outsourced to service providers and how much kept in-house?
- What is your distribution strategy and what impact will this have on playout? Do your channel distribution deals with local cable, IPTV, DTH and DTT distributors require the provision of non-linear services?
- What are the advantages and disadvantages of bypassing existing distributors and delivering services over-the-top direct to end users and what do you need to put in place to achieve this?

Let us look at each of these questions in turn.

1. What is the target market and what degree of localization will be required to meet the broadcaster's commercial objectives?

The target market and the degree of localization that will be needed are closely related.

For most broadcasters the target market will obviously be drawn from the international pay TV universe. Informa predicts that global pay TV subscribers will total almost 750 million by the end of this year, representing growth of approximately 5% year-on-year. While revenue per subscriber – a key metric for international channel providers – will vary widely between regions **(Fig. 1)**, this is continuing to grow overall.

Fig. 1: Expected global pay TV subscribers and ARPU by region end-2012

Region	Subscribers ('000s)	ARPU (US$)
Asia Pacific	407,833	7.16
Europe, East	62,158	10.28
Europe, West	95,212	26.73
Latin America	56,566	30.96
Middle East & Africa	12,826	31.72
North America	114,579	54.69
Global Total	**749,174**	**19.42**

Source: Informa Telecoms & Media

Global pay TV revenues are also continuing to grow overall, and are expected to reach US$170.4 billion by the end of this year, up over 4% year-on-year **(Fig 2)**.

A number of (largely US-based) media companies have launched thematic channels internationally that are aimed at a wide audience across multiple countries. Other broadcasters are looking to target specific immigrant groups in territories other than the one in which they are based. It is important in either case to identify the size of the potential target audience within the overall pay TV universe and to develop the distribution strategy that best suits the needs of that audience, for example by building relationships with distributors that serve a particular immigrant group and by tailoring marketing messages to meet those distributors' needs.

In the case of broadcasters aiming for a wide audience, localization efforts are likely to begin with (a) shifting the schedule to accommodate the needs of a particular time-zone, and (b) dubbing, subtitling or lectoring to address different language groups, followed by (c) re-scheduling all or part of the channel to meet specific local tastes and the requirements of distribution partners and regulators. To meet the channel's commercial objectives, this may be followed by (d) the introduction of local advertising windows and (e) programming opt-outs or even, finally (f) fully locally versioned channels.

Expatriate and immigrant groups around the world remain a largely underserved TV audience category, and channels targeting these groups have as their main purpose to serve people of similar cultural background who happen to be dispersed around the globe. Broadcasters targeting viewers that speak the language of their countries of origin may not need to worry about different language tracks. But they will need to do some localization, for example supporting rescheduling to meet the needs of the local time-zone.

Broadcasters may also need to substitute some programs specifically to meet local regulatory requirements. In many places around the world these requirements are becoming more rigorous. Channel providers in Asia, for example, are now provided with detailed guidelines on how to comply with local requirements covering licensing, censorship and broadcasting codes. To take one example, consider a direct-to-home satellite pay TV operator in the Middle East that distributes channels originating from the UK or other European countries that do not meet, in their original version, local rules about what can and cannot be shown. In this case material must be substituted on a show-by-show basis with some material in the live broadcast stream being substituted.

Fig. 2: Expected global pay TV revenue by region end-2012 (US$ mil.)

Asia Pacific	34,587
Europe, East	6,391
Europe, West	30,226
Latin America	19,816
Middle East & Africa	4,675
North America	74,740
Global Total	**170,436**

Source: Informa Telecoms & Media

Broadcasters targeting immigrant groups may also need to expand their efforts to make channels relevant to local audiences as the target market matures. For example, a South-Asian broadcaster targeting immigrants to the UK may make a greater effort to appeal to second and third-generation immigrants than it did when it was targeting a more recent immigrant population.

Broadcasters of all kinds may also localize feeds to accommodate local advertisers in particular markets, helping the channel to pay its way. They may also need to format their channels to meet specific technical requirements of distribution platforms in particular territories.

2. What do broadcasters need to do to maximize the value of the content rights they hold?

If a broadcaster is to schedule a channel for an international market, it will need to work out what rights it holds and how best to manage them.

The first point to make is that the old-fashioned linear channel remains the default choice for most broadcasters with international distribution strategies, despite the

proliferation of new digital distribution opportunities and the launch of video-on-demand services by platform operators. Broadcasters also continue to prefer to export their channel brands rather than individual program brands (through sales to third-party broadcasters for example) as a channel-based approach enables them to capture more of the overall value in the target market. It also enables them to spin off ancillary activities including packaged media sales, licensing and merchandising, as well as social media activities.

Exporting channels to international markets is however more complex than selling individual program brands because it requires clearance of rights across multiple territories. Localization of the channel schedule may therefore be required because the same content rights are not available in a particular timeframe in each territory in which the channel is present.

Broadcasters aiming to develop an international channel strategy can fall into a number of categories. Common examples include:

- Large international news broadcasters (including CNN, Russia Today and Al Jazeera). These broadcasters generally own most of the content they air, meaning that there is little chance of rights problems. However, some issues may arise over local censorship rules, requiring a decision to be taken on whether to accommodate these by removing some content.

- National broadcasters that are seeking to launch their channel into a new market, based on rights they already hold, without necessarily undertaking much in-depth localization. These broadcasters may air content in their home market that is supplied by production houses or other parties that retain the rights in other territories, leading to a need for program substitution in certain regions.

- Broadcasters with content rights that could be exploited internationally and that look to maximize the value of what they have, either by selling content directly to third-party broadcasters or by launching their own channel in specific territories. These broadcasters must balance the commercial objectives of their channel and programming sales arms. Program substitution may be required to ensure that programs already sold to existing local channels are not shown on the new channel.

- Smaller broadcasters looking to launch a channel internationally using re-licensed content. These broadcasters may need to acquire rights to content on a territory-by-territory basis. Rights are likely to be geographically restricted, leading to a significant need for localization.

There will inevitably be an opportunity cost to retaining rights to populate a new channel with valuable programming when rights to air those programs could be sold immediately to existing broadcasters in the target market. Broadcasters need to put rights management systems in place in order to ensure that they maximize the value of rights they hold while ensuring that contracts with third-party channels for content rights in particular territories and in given windows are honoured.

3. What infrastructure needs to be put in place to support localization?

Once rights have been sorted out and broadcasters have the assets in place to deliver a channel in an international market, they need to put in place the infrastructure to deliver it. What are the main factors that broadcasters must consider and the key steps that need to be taken before they begin to build localized versions of their channels? And how much variation is there in the way this is managed between different organizations?

Essentially, broadcasters need to be able to manage their video assets in such a way that they can populate the channel in a timely way, and distribute it economically and efficiently.

How broadcasters organize their channel management and playout will depend on how much they want to invest in their own infrastructure, how much they are willing to outsource and how much localization they need to deliver.

Broadly speaking, there are four degrees of localization that broadcasters could implement:

- International channels are all versions of a central parent channel with common content, but a subset of advertising delivered to different territories is 'localized', while still being managed from one central facility. This is simple for the broadcaster but may not meet all of the needs of local advertisers.

- Programming content remains centrally sourced and managed but a third-party provider manages locally relevant advertising at a local level. Cue tones are inserted in the video stream to allow adverts to be inserted in the relevant avails by the in-country party.

- The channel is enhanced by graphics and programs specifically designed for local audiences in selected territories – for example interstitial elements, local news and magazine programs. In this case some content may be scheduled from a central facility while other programs are played out locally.

- The channel is fully localized – with independent playout – for each territory. (The playout for each version of the channel could in this case still be housed at a central location but would be completely independent from the other versions).

At one extreme a broadcaster could play out an international version of its channel from its domestic playout facility (whether in-house or outsourced), handling localization requirements centrally. At the other extreme, it could set up the entire playout infrastructure for the new channel in the country it is targeting.

In either case, the broadcaster needs to have the ability to handle all the different graphics and interstitial elements required for the localized version of the channel. Generally a classic workflow would be set-up as follows:

- A long-term channel plan is created that identifies all the content that will be used on the channel at least three months in advance.

- The content will be provided to the compliance supplier who will check the content is acceptable in the target territory and edit as necessary.

- The content will then be sent to the versioning provider who will create additional audio tracks and/or subtitles.

- The content will be provided to the playout provider who will perform a final quality check and make the content available for playout.

- Final channel schedules will be created and provided to the playout provider (as late as the day of transmission). These will be used to create the final channel output.

Fig. 3 opposite is designed to give an example of the kind of workflow a broadcaster might put in place – in this case in partnership with GlobeCast acting as the playout provider.

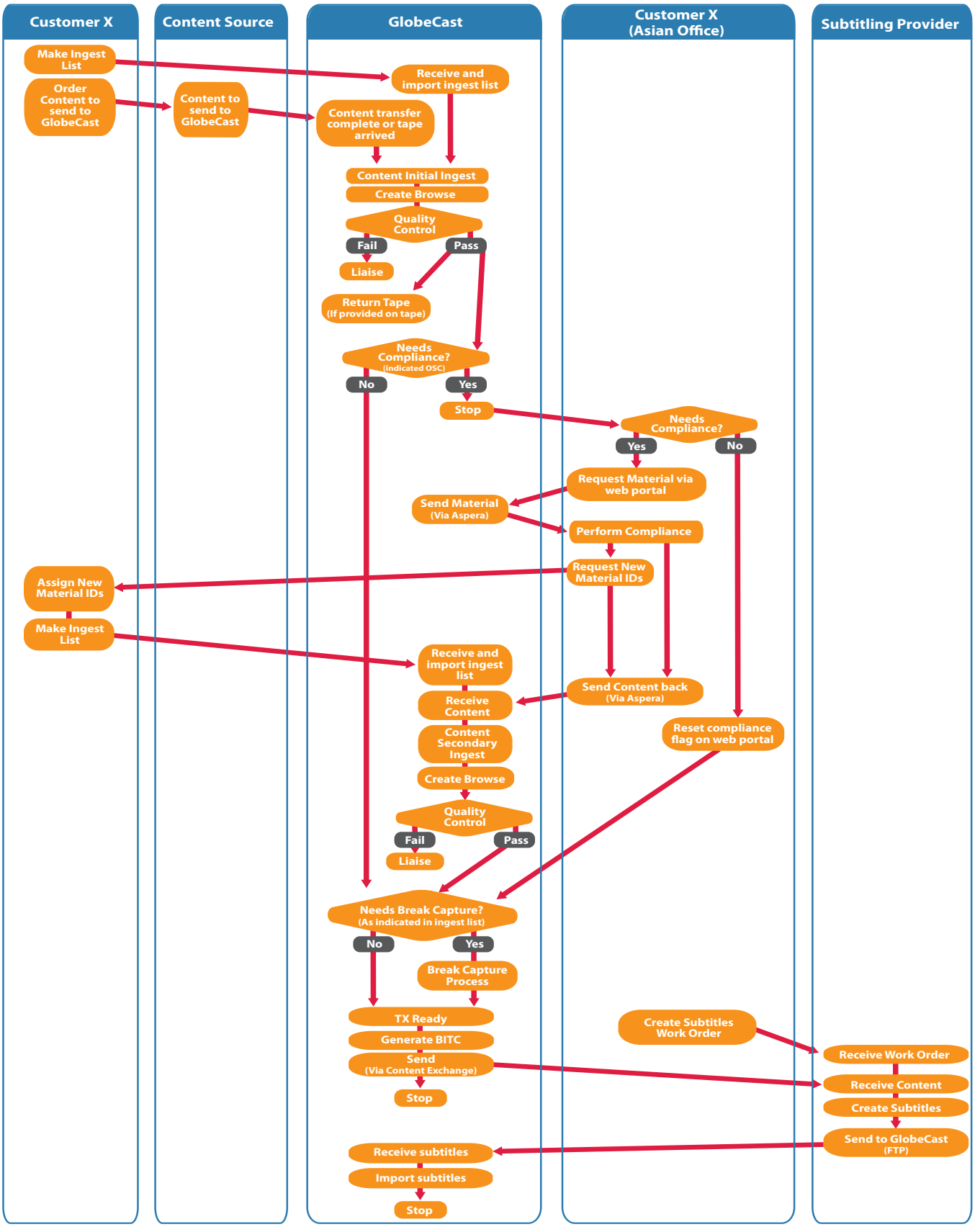
In the example shown, the key parts of the process are outsourced to GlobeCast. The broadcaster compiles an ingest list to schedule the channel and sends content via a secure link to GlobeCast. GlobeCast ingests the content, creates versions for browsing, provides quality control and then liaises with the customer's local office, which provides compliance if required. Cue triggers for local advertising opt-outs are inserted in the channel. GlobeCast will also send the content to a third-party subtitle provider if required, prior to receiving and importing the subtitle files and playing the channel out.

Whether the process is outsourced or not, the broadcaster and/or service provider must decide amongst other things whether to manage everything from a centrally-located facility or from a number of local centres. While locally-sourced playout has the advantage of being close to people with deep knowledge of the market and the sources of local advertising and programming, the cost of setting up infrastructure means that increasingly channel providers are locating as much of that infrastructure as possible in one central place.

The economic arguments for a relatively high degree of centralization of playout are compelling. A service provider can invest in systems that meet multiple broadcasters' requirements while at the same time developing workflows tailored to individual broadcasters' requirements. There are a number of established city-based locations around the world where an ecosystem of suppliers and local expertise has emerged to facilitate the creation and distribution of channels for international consumption. London is one such established media centre, offering an environment for basing international operations for broadcasters (with a mature ecosystem of post-production and versioning suppliers). Broadcasters and/or playout providers may also create 'hubs' for specific regions – countries, groups of countries, continents, up to and including the rest-of-the-world operations outside the home market.

Where it makes sense to devolve some playout functions at a more local level, for example to eliminate some of the backhaul costs of delivering multiple version of the channel from a central hub, the use of remotely managed software-based solutions that can be located in remote

Fig. 3: Sample workflow for creation and playout of an international channel



data centres – commonly called 'channel-in-a-box' solutions – is increasingly delivering significant cost savings.

These 'channel-in-a-box' solutions are for the most part best-suited to channels where a playlist is known ahead of time and does not significantly change near airtime, where graphics and branding requirements are relatively simple and where vendor-supplied automation, graphics and other features are acceptable to the broadcaster.

Integrated software-based playout systems of this type can help with localization if they offer the ability to insert local content including commercials and promos into the primary program stream. They may also enable the binding of local language subtitles at the point of playout in the channel's destination country.

Given the advantages of centralized facilities and the complexity of building and managing playout systems for multiple channels across multiple territories, broadcasters are increasingly outsourcing some or all of their channel management and playout to third-party service providers. Increasingly, much of the work involved in channel distribution and localization is provided as a virtual/managed end-to-end service by a global partner that will track and manage the flow of content between all of the specialist providers and provide seamless reporting. By outsourcing the technical elements of the final preparation and the delivery of the channel, a channel's management can focus on content and not spend time worrying about technical issues.

A recent GlobeCast case study can provide an interesting example of the way an international channel distribution strategy has been implemented in practice, with some functions being outsourced.

Bollywood broadcaster B4U distributes two premium movie-based channels across a large number of territories internationally. The broadcaster delivers two feeds of each service for the US and Canada, India and the UK and one feed each for Malaysia and the Middle East. Each feed is a dedicated, fully localized channel as B4U has different content rights for different territories. The broadcaster holds some rights in perpetuity while others are acquired on a time- and geography-limited basis from movie studios in India, so the channels for each territory are scheduled separately. Revenue is primarily via subscription, with about 20% of revenue accounted for by advertising. Cue tones are included in each feed to enable local cable operators to insert adverts in territories where they are contractually entitled to do so.

B4U turned to GlobeCast in order to further its ambition to fully localize its channels. The broadcaster has adopted a centralized model with global operations based in London. All content is stored centrally. GlobeCast provides a fibre link from India to London to backhaul content for storage and playout. Content is produced and acquired in India and stored centrally by GlobeCast with metadata input by B4U to enable it to easily identify which content should be delivered to which territory. B4U's staff in India have remote access, enabling them to view all content that has been ingested into the system as well as monitor the channels themselves. B4U's London office meanwhile principally handles distribution, sales and marketing.

Rights data is held in Mumbai, with GlobeCast's facility in London receiving both the content and metadata via a fibre link and providing playout as well as uplinking and space segment. B4U's Mumbai staff provides the schedule and playlist, while GlobeCast encodes the channel and uplinks from its server. B4U ensures that the content to be distributed in its different markets complies with rights and local regulatory regimes. It also provides some 10 layers of graphics, including program credits, now-and-next information, logos and animations that are localized for different territories. The Indian versions of the channels can for example include advertising on a ticker at the bottom of the screen, something that can't be done on the UK feed under Ofcom rules.

The Hindi-language channels also carry English, Arabic and Malay subtitles. Subtitling is outsourced in India, with the subtitle files sent digitally to GlobeCast to be overlaid on the relevant feeds. B4U is also planning to launch a dubbed version of the channel in Arabic to target Arabic-speaking viewers in the Middle East.

B4U estimates that about 95% of the process is automated, with manual intervention kept to a minimum. The broadcaster, which formerly sent tapes for onward playout, has migrated to a fully tapeless system that enables it to avoid customs delays as well as to reduce courier costs, storage and duplication.

In addition to playout and uplink, GlobeCast also provides (via its Singapore office) representation for B4U with service providers in the Asia Pacific region.

4. What is the broadcaster's distribution strategy and how will this impact playout?

As well as creating the technical infrastructure to support the delivery of localized channels, broadcasters will seek distribution deals for those channels with cable, satellite and IPTV platforms in the target country.

Increasingly, these distribution partners are looking for additional support from their content partners. Broadcasters need to make their channels appealing to distributors. For a channel seeking carriage on US pay TV networks, for example, it will be of key importance to schedule attractive content in primetime and possibly to produce and schedule content specifically created for the local audience.

Broadcasters may also allow local cable operators to sell advertising on their channels, allocating a set number of advertising minutes per hour to their distributors – a practice that is common in the North American and Caribbean markets.

In addition to putting in place the necessary technical infrastructure and securing carriage agreements with local distribution partners, the broadcaster generally must also take whole or partial responsibility for marketing the channel in the target markets. Broadcasters that are well established in their home markets and enjoy a high recognition factor amongst TV viewers there may find, to their surprise, that their existing brands carry much less weight overseas. They may need to build marketing activities from the ground up, indentifying key programs and anchor stars with local appeal as well as being prepared to take steps to educate the target audience about the value of their properties.

For broadcasters that are major players in their home markets, this may involve a significant shift in expectations and behaviour. For platform operators in the target market – particularly a large heterogeneous market such as the US – the broadcasters will likely be one of a large number of players pitching to fill one of a very limited number of slots allocated to international channels.

Third party service providers can play a useful role here in acting as intermediaries, helping the channel provider to prepare the marketing material it needs to gain the attention of cable operators and other distribution partners. This can include things such as providing a description of the channel that supplies information about why potential subscribers might be interested, identifying the key primetime shows on the channel and, ideally, bringing stars recognised by consumers in the target market to the launch of the service.

Media service providers can advise the broadcaster on what platforms are looking for and which platforms are likely to have members of the target audience among their subscriber base, whether those target subscribers are over- or underserved by existing channels and where there are gaps in the market. Through relationships with service providers they can also offer advice about which platform operators are more open to offering slots to international channel providers, whether to meet diversity requirements for marketing or specific revenue goals.

Distribution partners now commonly ask for broadcasters to provide non-linear on-demand services to support the linear channel. This will necessitate preparation of content for non-linear platforms including video-on-demand and catch-up services to complement the existing linear service. This is increasingly being integrated into the content preparation and playout process. Broadcasters need to transcode content for delivery over VOD platforms. When that content is versioned for a particular country it makes sense to use the same asset for different VOD platforms. Currently this is mostly being done for fixed-line VOD services delivered by platform operators.

While on-demand offerings are generally bundled with the linear channel as a 'free' add-on, global on-demand revenues are increasing, and are expected to total US$8.3 billion by the end of this year **(Fig. 4, overleaf)**.

Service providers are also increasingly looking to extend the reach of their linear services to multiple devices and to complement their linear channels with 'second-screen' interaction. (For some channel providers, the second screen – whether tablet, smartphone or laptop computer – could even provide a platform for the first stage of 'localization' of an international channel feed to make the channel more appealing to the in-country audience.)

Broadcasters must address how content for all these services is sourced, ingested, stored and managed and create workflows for the non-linear services and for services that deliver the content – live or on-demand – to

Fig. 4: Expected Global On-Demand Revenue by Region at end-2012 (US$ mil.)

Asia Pacific	1,884
Europe, East	578
Europe, West	1,788
Latin America	932
Middle East & Africa	167
North America	2,930
Global Total	**8,279**

Source: Informa Telecoms & Media

multiple devices including tablets and smartphones. Distribution could for example be via a content delivery network rather than a satellite uplink.

In order to deliver these non-linear services, broadcasters are increasingly looking to hold onto as many rights as they can to the content they air. They are increasingly looking to acquire rights for distribution on multiple devices in multiple territories.

5. What are the advantages and disadvantages of a pure OTT distribution strategy?

Broadcasters could of course choose to bypass the established cable, satellite and IPTV distribution eco-system completely and adopt a strategy of delivering their services direct to end users 'over-the-top' either on their own or via OTT distribution partners.

Third-party aggregators have sprung up to enable the OTT delivery of services to expatriate and immigrant groups in particular. If broadcasters choose to go down the OTT route to deliver channels to audiences internationally, they may face a few additional challenges to those already outlined for international broadcast-delivered services.

- Channels may already have exclusive or quasi-exclusive distribution deals in place with existing cable, IPTV and satellite platforms in the relevant territory where they plan to launch. By 'going it alone' they may jeopardise these existing relationships.

- In view of this, channel providers must take great care to be aware of restrictions on any rights they do retain, and must try to avoid situations where the sale of rights with some degree of exclusivity could be open to interpretation. Are the deals they sign with distributors limited by geography or by distribution platform (e.g. is there a distinction between IPTV distribution and internet distribution)? Is there a distinction between linear and non-linear rights?

- If a channel is being created from scratch by an aggregator for OTT distribution, the aggregator must be very careful that they hold all the necessary rights to each piece of content they use.

- Content rights-holders have additional concerns about security when delivery to end-users is via the open internet. If the 'last mile' to the consumer is outside the control of the distributor, as is the case with many OTT platforms, broadcasters must ensure security over the entire delivery path. (Broadcasters choosing to go down the OTT route may of course benefit to some extent from the global scale of individual DRM implementations – unlike linear broadcast channel providers, which have to encrypt channels on a territory-by-territory or operator-by-operator basis.)

- In addition to the security issues, rights-holders may also set minimum quality thresholds, meaning that the distributor may set a minimum recommended bandwidth for the service, especially for services marketed as HD-like. It is important therefore for the channel provider to select partners with a proven track record in video compression in order to maintain the maximum possible quality.

Despite these challenges, the OTT route confers a number of advantages to channel providers. It cuts through existing distribution barriers and offers a way to expand reach. It eliminates the problem of restrictions on satellite dish use in urban areas. It offers a way to reach viewers at lower cost than by acquiring expensive broadcast spectrum. National broadcasters targeting immigrant groups dispersed in relatively small populations in countries around the world could struggle to make a broadcast model work but may more easily target those

groups by delivering their channels over the internet to a connected TV platform. And finally, OTT offers a way to deliver the service to multiple devices both inside and outside the home (provided, as always, that the rights are available).

However, while OTT certainly confers some advantages, broadcast remains the most viable option for channels seeking to reach a large audience. Most advertisers remain primarily interested in broadcast rather than online services and it may therefore be harder (for now at least) to monetize an OTT channel effectively.

Conclusion

The market for international channels is growing and – given the increasing mobility of people across international frontiers – that growth is likely to accelerate. The growing diversity of populations around the world and the growing popularity among wider groups of people for international news and entertainment programming present opportunities that no international content owner should ignore.

While the opportunity is real and clearly should be embraced, broadcasters – especially those new to the international programming arena – need to learn how to avoid the pitfalls. The biggest of these are being overconfident and underprepared.

As far as the infrastructure investment is concerned, the key lesson to take on board regards economies of scale. The more that channels pool their efforts – which will generally mean tapping the assistance of a third-party media services provider – and centralize the infrastructure to support multiple international channels, the less will be the incremental cost of each new channel launched. Where some smaller tasks can done at a more local level remotely using low-cost solutions, other more complicated processes – for example subtitling or advertising insertion – can be outsourced to full-service providers, who perform these operations either locally or remotely. Once again, the assistance of a third-party service provider that can share the investment across multiple channels can provide a real cost saving.

But beyond putting in place the technical infrastructure, channel providers that are market leaders in their home markets need to take on board the fact that they may merely be one of a large number of relatively little-known players in the markets they are targeting internationally. So what are the key steps? In the first place broadcasters need to verify that there is a viable target market for their service. Having established that the market is there, they need to ensure they have the rights in place to create an attractive and compelling offering that will appeal not only to consumers but to the cable and other distribution partners with whom they need to do business. Above all they need to tailor their channel – and the marketing effort around it – to meet the actual needs of consumers and distributors in the target market.

Choosing partners that can provide honest, unbiased feedback on the commercial reality of doing business in an international market and that have well-established relationships with local distributors can deliver real benefits. By providing both technical infrastructure and commercial expertise, the right partner can help broadcasters avoid both the commercial and infrastructure-related pitfalls and help them realise the goal of building a truly viable international channel business. The ultimate result of "going local" on a global scale will be an on-target viewer experience, where each individual is receiving the right content, at the right time, on the right device.

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